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ABSTRACT

This third edition of guidelines for interlibrary lending in Wisconsin outlines the responsibilities of borrowing and lending libraries; the operating assumptions, principles, and goals of the interlending program; the steps for developing area interlibrary loan plans; and the recommended interloan patterns for public, school, academic, and special libraries in the state, and also for vocational-technical school libraries (added with this edition). Revised to reflect changes in interlibrary loan patterns, the 1985 guidelines contain the following changes: (1) area plan development is still voluntary, but public library systems have been assigned the responsibility of coordination of the plan development process; (2) the definitions have been expanded and clarified and new definitions for area, clearinghouse, resource library, and direct access are included; (3) the patterns have been clarified and expanded to include the concept of direct access at the area level, from the area level to the state level, and from library to library; patterns of referral from the state to the area level are included; and the referral actions of state level clearinghouses are clarified; (4) patterns for reference requests are included when they differ from interlibrary loan patterns; (5) the section for special libraries has been expanded to include information on some patterns for individual types of libraries; and (6) a section for libraries not located in system areas has been added. A model worksheet is included. (THC)

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Wisconsin Interlibrary Loan Guidelines

Third Edition 1985

Wisconsin Department of Public Instruction
Division for Library Services

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PREFACE

The first edition of the **Wisconsin Interlibrary Loan Guidelines** was published in May of 1980. The **Guidelines** were the result of eight months work by the Statewide Committee on Interlibrary Loan and Reference Referral Patterns in Wisconsin. The Committee was jointly sponsored by the Division for Library Services, the Council of Wisconsin Libraries and the Council on Library Development.

The Statewide Committee on Interlibrary Loan and Reference Referral continued to meet periodically to review and accept interlibrary loan plans from areas of the state and to review, evaluate and propose modifications in the **Guidelines.** A second edition of the **Guidelines** was published in 1982 and incorporated minor changes and suggestions from the Committee. Area plans were received from sixteen areas of the state. The committee was not a permanently appointed committee and its work was completed in 1982.

In late 1980, the Council on Library and Network Development was formed and replaced the Council on Library Development. The council was given responsibility in Chapter Law 347 to conduct several studies including, 1) study of aids to medical libraries and system resource libraries 2) study of state level resource libraries and 3) study of regional organizations for interlibrary cooperation and resource sharing. These studies were conducted in 1982 and 1983 and sent to the governor and/or the legislature as directed.

During the process of conducting the studies, the council formed a subcommittee to study interlibrary loan issues and make suggestions on future directions, to review state level interlibrary loan contracts and to review area interlibrary loan plans. In addition to its other tasks the committee collected information for the study of state level resource libraries, and paid special attention to several other areas including, the amount of sharing of materials at the area level, changes in interlibrary loan patterns as a result of new resource sharing tools, the problems associated with school library media center participation in interlibrary loan, and the process and procedures of developing area interlibrary loan plans. Council members reviewed the information from **The Survey of Wisconsin Interlibrary Loan Patterns** and conducted two short surveys; 1) on the sharing of materials by small libraries which are listed in statewide resource sharing tools and 2) on interlibrary loan service from public library systems for schools.

In 1985, the Council on Library and Network Development recommended that the **Guidelines** be revised to reflect changed patterns and to clarify a number of concepts. The Council subcommittee worked with Division staff to undertake this revision. The third edition of the **Guidelines** contains the following changes:

1. Area plan development is still voluntary, but public library systems have been assigned the responsibility of coordinating the plan development process.

2. The definitions have been expanded and clarified. New definitions for area, clearinghouse, resource library, and direct access are included.

3. The patterns have been clarified and expanded to include the following new concepts:

   The concept of direct access has been defined at the area level, from the area level to the state level, and from library to library.

   Libraries may borrow from each other directly according to mutual agreements.

Patterns for referral from the state to the area level are included.

The referral actions of state level clearinghouses are clarified.

4. Patterns for reference requests are included when they differ from interlibrary loan patterns.

5. A section for vocational-technical school libraries was added.

6. The section for special libraries was expanded to include information on some patterns for individual types of libraries. This section is still not exhaustive, and other patterns may be available to some types of libraries.

7. A section for libraries which are not located in system areas was added.

In recognition of the importance of interlibrary lending and borrowing to Wisconsin residents, the Council on Library and Network Development reviewed and endorsed these guidelines and is pleased to have them distributed to Wisconsin libraries of all types. It is recommended that each library review the introductory sections and the specific section that applies to that type of library.

Council on Library and Network Development members:

Ruth Schmidt, Chair
Charles Brenden
Paul Moriarty
Jan Coombs
Mary Kotschi
Venora McKinney
Eugene McLane
Bill Wilson
Barbara Karlen
Jim Klein
Esther Koblenz
Jim Krems
Joyce Feustel
Louise Pittman
David Barnard

INTERLIBRARY LOAN RESPONSIBILITIES

The patterns recommended in these **Guidelines** are to provide direction for interlibrary lending and borrowing among libraries in the State of Wisconsin. These **Guidelines** are based on the premise that lending among libraries for the benefit of an individual in the State of Wisconsin is in the public interest and should be encouraged.

Responsibility of lending libraries

Libraries should practice as liberal and unrestricted an interlibrary lending policy as is possible with due consideration for the interest of their primary clientele. Libraries which are listed in WISCAT have generally agreed to interlibrary loan items which would be circulated to their own clientele except as noted under "Scope of Materials."

Responsibility of borrowing libraries

The ability to borrow from other libraries does not relieve any library of the responsibility for developing its own collection. Each library should provide the resources to meet the recurring study, educational, instructional, informational, and research needs of its users. Requests to borrow from other libraries should be limited to those items which the library might not be expected to own. No library should depend upon another to supply the normal needs of its clientele except under special agreement for such service.

Scope of materials

Any type of library material or information needed for the purposes of study, instruction, information, or research may be requested on loan or in photocopy from another library. The lending library has the privilege of deciding in each case whether a particular item should or should not be provided, and whether the original or a copy should be sent. These decisions may be determined by the nature of the material, its physical condition or the degree of active demand for the material requested.

DEFINITIONS

Terms are defined here as they are used in the Guidelines.

Interlibrary Loan or Reference Question Referral

A transaction in which library materials, or copies of the materials, are made available by one library or information service to another upon request for a specific item or general or specific information.

Area

For libraries located in an area where there is a public library system, the area is defined as that of the public library system.

For libraries located in an area where there is not a public library system, the area is defined as the county in which the library is located.

Two or more areas may cooperate in the development of a plan and submit a plan together.

Area Interlibrary Loan Plan

A written description of the patterns for sending and receiving interlibrary loan and reference requests within an area. The plan will list area clearinghouses, list libraries having direct access to state level clearinghouses and resource libraries and provide other information about area resource sharing procedures and patterns.

Area Clearinghouse

A library or library organization which **receives and refers** interlibrary loan requests on behalf of other libraries within a defined area.

> The area clearinghouse will generally fill requests from its own collection if there is one, use other collections available to it, or refer the request to other libraries within the area. An area clearinghouse is responsible for verifying bibliographic and location information, for determining from information included on the request if the originating library had already attempted to borrow from area libraries, and, if not, for utilizing area resources. After known area resources are checked and used if possible, the area clearinghouse will send requests to state level clearinghouses or other specialized resources.
>
> The public library system headquarters or resource library will be a designated area clearinghouse. Other area clearinghouses or resource libraries may be listed in the area plan.

Area resource library

A library within an area which has a major collection, is willing to lend materials, and receives and processes requests, but which **does not refer** requests routinely to other libraries if a request cannot be filled from its own collection. Area resource libraries may be listed in the area plan.

State level clearinghouse

A library or library organization which **receives and refers** interlibrary requests on behalf of other libraries or library organizations inside and outside Wisconsin.

A state level clearinghouse fills requests from its own collection if it has one, uses other collections available to it, and refers requests to other Wisconsin libraries or clearinghouses and to libraries outside Wisconsin when contracts with other state libraries or library organizations authorize this action. A state level clearinghouse is responsible for assuring that all known locations within Wisconsin have been contacted and used when possible prior to referring a request outside of Wisconsin. This is determined either from information provided on the request by the originating library, the area clearinghouse or from the efforts of the state level clearinghouse. A state level clearinghouse does not refer a request back to the area from which the request originated.

At this time, state level clearinghouses are the Reference and Loan Library and WILS (Wisconsin Interlibrary Services).

The Reference and Loan Library is funded by the Department of Public Instruction/Division for Library Services to provide library services to backup and supplement services offered by public library systems, state institutions, state agencies, state level clearinghouses, and other authorized libraries. The Division also contracts with Milwaukee Public Library and WILS to provide verified materials which cannot be provided by the Reference and Loan Library. Interlibrary loan and reference services are provided. No fees are charged to libraries for use of the interlibrary loan service.

WILS provides interlibrary loan services to libraries which join WILS and pay fees for services. WILS provides interlibrary loan, reference, and data base search services. WILS is located in UW-Madison Memorial Library and utilizes the library's collection to respond to the majority of interlibrary loan and reference requests. The Department of Public Instruction/Division for Library Services contracts with WILS to process requests referred by public library systems and the Reference and Loan Library. These guidelines are not intended to replace or conflict with services WILS provides to its members or with existing arrangements among WILS members.

State level resource library

A library which has a specialized collection containing many materials that are not owned by other Wisconsin libraries, is willing to lend those materials, and receives and processes requests, but which **does not refer** requests routinely to other libraries.

Milwaukee Public Library serves as a state level resource library through a contract with the Department of Public Instruction/Division for Library Services. The Milwaukee Public Library provides interlibrary loan services for verified requests sent by the Reference and Loan Library or other libraries authorized by the Division for Library Services.

In addition, Milwaukee Public Library also serves as the area clearinghouse for the Milwaukee County Federated Library System.

Direct Access

The process of sending an interlibrary loan or reference request directly to another library without first sending it through a clearinghouse. Libraries may be authorized to use direct access at one or more levels.

Within an area

The area interlibrary loan plan will describe the direct access patterns for each area. Libraries may send requests directly to other libraries within an area when authorized by the area plan.

From the area to state level clearinghouses

A library or library organization which has the **authorization** and the **ability** to do so may send requests directly to any of the following state level clearinghouses or resource libraries: the Reference and Loan Library, WILS (Wisconsin Interlibrary Services), and Milwaukee Public Library.

An area clearinghouse has **authorization** for direct access to any of the above state level clearinghouses or resource libraries if it has notified that organization that requests will be sent routinely. Other libraries in an area may have direct access if so designated in an area plan and if prior arrangements with the state level clearinghouse or resource library have been made.

A library has the **ability** to use direct access to the above organizations if it generates a large number of requests, owns and uses the appropriate resource sharing tools to determine if area resources have been contacted prior to sending a request to the state level, and uses compatible telecommunications equipment to send and receive requests. In most cases, the library also can and does verify which state level clearinghouse or resource library owns the material.

From library to library outside the area

Libraries may be authorized by mutual agreement to borrow directly from each other. Agreements should be developed in advance of borrowing or lending.

Resource sharing tools

Lists, catalogs, directories or other publications which allow libraries to verify the correct bibliographic citation for an item and to determine which library owns that item.

A resource sharing tool may be available in printed form, microform, or online. Examples include local lists of serials or specialized materials, WISCAT, OCLC, and the Wisconsin Union List of Serials.

Type of library

Guidelines are provided for public, school/IMC, academic, vocational-technical school and special libraries located in areas where there is a public library system. In addition, a section is included for libraries of all types which are located in counties which have not joined a public library system. Libraries should identify the section which best relates to them and review that section carefully

AREA INTERLIBRARY LOAN PLANS

PURPOSES OF AREA INTERLIBRARY LOAN PLANS

1. To develop procedures for borrowing and lending materials and sharing information at the area level.

2. To provide a mechanism to get area librarians together to participate in area resource sharing and develop interlibrary loan protocols.

3. To ensure the use of all area resources before use of state level library resources.

4. To designate area clearinghouses and establish procedures for referral of interlibrary loan requests from the area level to the state level.

5. To develop procedures for referral of interlibrary loan requests from the state level to the area level and from area to area.

6. To define methods of sending and receiving interlibrary loan requests at area and state levels and to indicate which libraries use them.

7. To define methods of delivering library materials requested through interlibrary loan at the area and state level.

8. To develop some level of uniformity in data collected and protocols for all area plans.

9. To coordinate the area interlibrary loan plan with system planning and the development of multitype library systems in Wisconsin.

DEVELOPMENT OF THE AREA INTERLIBRARY LOAN PLAN

The plan should be developed by the public library system with a planning group which includes representatives of the different types of area libraries from the area multitype library cooperation organization or system multitype advisory group. The plan is voluntary. It can be used by systems as partial fulfillment of system service requirements. When developed it should be filed with the Public Library System Plan of Service. Two or more systems may develop a plan together. The plan should be reviewed every three years and revised if necessary. A model worksheet is included at the end of the guidelines, but its use is not mandatory.

PLAN CONTENT

The following information should be included in the area interlibrary loan plan.

1. The patterns for borrowing and lending library materials within area for each type of library. (Example - patterns for direct access at the area level; patterns for referral to area clearinghouse(s).)

2. The names of area clearinghouses and what types of libraries each serves.

3. The names of area resource libraries and what types of libraries each serves.

4. The names of WILS members and other libraries which are authorized to send requests directly to state level clearinghouses/resource libraries.

5. A description of any groups of libraries which have mutual agreements for sharing of materials outside the area prior to using patterns.

6. Patterns for handling referral of requests from the state level clearinghouses to the area level.

7. The geographic area included in the plan.

8. A description of the methods of sending and receiving interlibrary loan requests inside and outside the area and an explanation of which libraries use them. (Example -TWX, microcomputer, mail, telephone.)

9. A description of the methods of delivering interlibrary loan materials inside and outside the area.

10. The union lists and other tools used to locate materials and facilitate sharing.

11. The names of major area libraries not participating in the area plan.

12. A description of the process used in developing the area plan and the names and representation of the people involved in its development.

13. The name, address and phone number of the system contact person for the area interlibrary loan plan

14. The effective date of the plan.

REVIEW OF PLANS

Plans will be reviewed by the Division staff in conjunction with public library system plan review. The Council on Library Network Development will review major issues related to interlibrary loan policy.

WISCONSIN INTERLIBRARY LOAN PATTERNS

I. PUBLIC LIBRARIES*

A. Library level

The public library staff should be certain that the materials or information cannot be found in their own collection and provided in a timely fashion to fill the request.

B. Area level

1. The library staff should use any resource sharing tools available in the library to determine if materials are available within the area defined by the area plan. The library may send requests to any library within the area owning the materials and participating in the area plan or, if authorized, directly to the area clearinghouse. If unsuccessful contacts or referrals are made to libraries within the area prior to sending a request to an area clearinghouse, the library should record on the request which libraries have been contacted.

   Note: In some areas, public libraries may be required to send requests through a county library service prior to referral to a public library system clearinghouse.

2. The public library system headquarters or resource library will be a designated area clearinghouse. Other area clearinghouses or resource libraries may be listed in the area plan.

C. State level

1. The area clearinghouse(s) (or a library which has been authorized to send requests directly to a state level clearinghouse or resource library) will verify bibliographic information and identify possible locations for the item requested using available statewide resource sharing tools. The request will be referred in one of the following ways.

   a. If an item is identified as being available from **only one** of the following state level clearinghouses/resource libraries: The Reference and Loan Library, Milwaukee Public Library, or WILS (held by a UW-Madison campus library), an area clearinghouse may send the request directly to the appropriate state level clearinghouse/resource library.

   b. If an item is held by **more than one** of these state level clearinghouses/resource libraries, the area clearinghouse(s) will send the request to them according to the following priority.

      (1) The Reference and Loan Library
      (2) Milwaukee Public Library
      (3) WILS (Wisconsin Interlibrary Services)

*Guidelines are for public libraries in a public library system. Public libraries which are not in systems should see the guidelines on p. 24.

c. If an item is available from none of the state level clearinghouses/ resource libraries, the area clearinghouse(s) will refer the request to the Reference and Loan Library for further referral.

2. The clearinghouse(s) will send all requests for information (reference or subject requests) to the Reference and Loan Library.

D. Further referral by state level clearinghouses/resource libraries

1. The Reference and Loan Library will refer unfilled requests for identified titles to Wisconsin State agency libraries, Milwaukee Public Library, WILS, public library systems in Wisconsin, the Illinois State Library, and MINITEX. Unfilled subject or reference requests will be referred to WILS Reference Service, UW-Madison Middleton Health Sciences Library, and UW-Engineering/Information Services Division.

2. Milwaukee Public Library will return unfilled requests to the requesting clearinghouse library.

3. WILS will refer unfilled requests to other WILS interlibrary loan service members, MINITEX, the Reference and Loan Library, and University of Illinois.

Note: None of the state level clearinghouses will refer a request to a library within the area where it originated.

E. Other arrangements

1. Within Wisconsin

a. Requests may be sent directly to any library in the state which has specialized collections if the material or information is not available in the area or through an area clearinghouse. Prior to sending requests, the public library should determine if the library with the specialized collection is willing to serve it directly.

b. By mutual arrangement, public library system clearinghouses may borrow from each other prior to using other interlibrary loan channels. If unsuccessful contacts or referrals are made prior to sending a request to a state clearinghouse or another library, the library should record on the request which libraries have been contacted.

2. Out-of-state

a. Public libraries may send requests for materials or information not available in Wisconsin to any library which will serve them directly.

Note: Under reciprocal borrowing agreements, the Reference and Loan Library and WILS access Minnesota libraries belonging to MINITEX, the Illinois State Library, and the University of Illinois. Therefore, it is not necessary to access these libraries directly.

To facilitate out-of-state referral and to assure that the referral will receive attention, the request should include a statement that the material is not available in Wisconsin.

b. For requests received from outside Wisconsin, each library should follow its own lending policy. If your library sends requests directly to libraries outside Wisconsin, you may want to consider lending to libraries outside Wisconsin.

F. Referral from the state level to the area level

When a state level clearinghouse has utilized all state level resources available to it and verifies that an individual library is the only available source for an item, the following actions will be taken.

1. If the item is owned by a public library system clearinghouse or resource library or by a public library within the system, the Reference and Loan Library will refer requests to the public library system clearinghouse.

2. If the item is owned by a library other than a public library or a WILS interlibrary loan service member, the Reference and Loan Library will refer requests directly to the library or to the public library system clearinghouse according to the pattern established in the area plan.

3. If the item is owned by a WILS interlibrary loan service member, WILS will refer the request to the member library.

4. Milwaukee Public Library does not refer requests to area level libraries or clearinghouses on behalf of other libraries.

WISCONSIN INTERLIBRARY LOAN PATTERNS

II. SCHOOL LIBRARIES/INSTRUCTIONAL MEDIA CENTERS (IMC)*

A. Library level

The school library/IMC staff should be certain that the materials or information cannot be found in their own collection or collections at other schools in the district and provided in a timely fashion to fill the request.

B. Area level

1. The library staff should use any resource sharing tools available in the library to determine if materials are available within the area defined by the area plan. The library may send requests to any library within the area owning the materials and participating in the area plan or, if authorized, directly to the area clearinghouse. If unsuccessful contacts or referrals are made to libraries within the area prior to sending a request to an area clearinghouse, the library should record on the request which libraries have been contacted.

   Note: School library/IMC staff may be required by the area plan to send requests to a local public library prior to referral to the area clearinghouse. Even if this is not the case, the public library in the community may be a useful referral source. School libraries/IMCs participating in a CESA specialized interlibrary loan program should use these services before referring requests to the area clearinghouse.

2. The public library system headquarters or resource library will be a designated area clearinghouse. Other area clearinghouses or resource libraries may be listed in the area plan.

C. State level

1. The area clearinghouse(s) (or a library which has been authorized to send requests directly to a state level clearinghouse or resource library) will verify bibliographic information and identify possible locations for the item requested using available statewide resource sharing tools. The request will be referred in one of the following ways.

   a. If an item is identified as being available from only one of the following state level clearinghouses/resource libraries: The Reference and Loan Library, Milwaukee Public Library, or WILS (held by a UW-Madison campus library), the area clearinghouse may send the request directly to the appropriate state level clearinghouse/resource library.

   b. If an item is held by more than one of these state level clearinghouses/resource libraries, the area clearinghouse(s) will send the request to them according to the following priority.

*Guidelines are for school libraries/IMCs which are located in areas where there is a public library system. School libraries/IMCs located in areas where there is no public library system should see the guidelines on p. 24.

(1) The Reference and Loan Library
(2) Milwaukee Public Library
(3) WILS (Wisconsin Interlibrary Services)

c. If an item is available from none of the state level clearinghouses/ resource libraries, the area clearinghouse(s) will refer the request to the Reference and Loan Library for further referral.

2. The clearinghouse(s) will send all requests for information (reference or subject requests) to the Reference and Loan Library.

D. **Further referral by state level clearinghouses/resource libraries**

1. The Reference and Loan Library will refer unfilled requests for identified titles to Wisconsin State agency libraries, Milwaukee Public Library, WILS, public library systems in Wisconsin, the Illinois State Library, and MINITEX. Unfilled subject or reference requests will be referred to WILS Reference Service, UW-Madison Middleton Health Sciences Library, and UW-Engineering/Information Services Division.

2. Milwaukee Public Library will return unfilled requests to the requesting clearinghouse library.

3. WILS will refer unfilled requests to other WILS interlibrary loan service members, MINITEX, the Reference and Loan Library, and University of Illinois.

Note: None of the state level clearinghouses will refer a request to a library within the area where it originated.

E. **Other arrangements**

1. **Within Wisconsin**

a. Requests may be sent directly to any library in the state which has specialized collections if the material or information is not available in the area or through an area clearinghouse. Prior to sending requests, the school library/IMC should determine if library with the specialized collection is willing to serve it directly.

b. By mutual arrangement, school or school district libraries/IMCs may borrow from other school or district libraries/IMCs prior to using other interlibrary loan channels. If unsuccessful contacts or referrals are made prior to sending a request to a state clearinghouse or another library, the library should record on the request which libraries have been contacted.

2. **Out-of-state**

a. School libraries/IMCs may send requests for materials or information not available in Wisconsin to any library which will serve them directly.

Note: Under reciprocal borrowing agreements, the Reference and Loan Library and WILS access Minnesota libraries belonging to MINITEX, the Illinois State Library, and the University of Illinois. Therefore, it is not necessary to access these libraries directly.

To facilitate out-of-state referral and to assure that the referral will receive attention, the request should include a statement that the material is not available in Wisconsin.

b. For requests received from outside Wisconsin, each library should follow its own lending policy. If your library sends requests directly to libraries outside Wisconsin, you may want to consider lending to libraries outside Wisconsin.

F. Referral from the state level to the area level

When a state level clearinghouse has utilized all state level resources available to it and verifies that an individual library is the only available source for an item, the following actions will be taken.

1. If the item is owned by a public library system clearinghouse or resource library or by a public library within the system, the Reference and Loan Library will refer requests to the public library system clearinghouse.

2. If the item is owned by a library other than a public library or a WILS interlibrary loan service member, the Reference and Loan Library will refer requests directly to the library or to the public library system clearinghouse according to the pattern established in the area plan.

3. If the item is owned by a WILS interlibrary loan service member, WILS will refer the request to the member library.

4. Milwaukee Public Library does not refer requests to area level libraries or clearinghouses on behalf of other libraries.

WISCONSIN INTERLIBRARY LOAN PATTERNS

III. ACADEMIC LIBRARIES*

A. Library level

The academic library staff should be certain that the materials or information cannot be found in their own collection and provided in a timely fashion to fill the request.

B. Area level

1. The library staff should use any resource sharing tools available in the library to determine if materials are available within the area defined by the area plan. The library may send requests to any library within the area owning the materials and participating in the area plan or, if authorized, directly to the area clearinghouse. If unsuccessful contacts or referrals are made to libraries within the area prior to sending a request to an area clearinghouse, the library should record on the request which libraries have been contacted.

2. The public library system headquarters or resource library will be a designated area clearinghouse. Other area clearinghouses or resource libraries may be listed in the area plan.

C. State level

1. WILS (Wisconsin Interlibrary Services) members will normally send interlibrary loan and reference requests directly to WILS.

2. An academic library may send verified requests directly to a state level clearinghouse or resource library if the academic library is a WILS interlibrary loan service member or has been authorized to send requests to other state level clearinghouses or resource libraries.

3. If requests are sent through an area clearinghouse(s), the clearinghouse(s) will verify bibliographic information and identify possible locations for the item requested using available statewide resource sharing tools. The request will be referred in one of the following ways.

   a. If an item is identified as being available from **only one** of the following state level clearinghouses/resource libraries: The Reference and Loan Library, Milwaukee Public Library, or WILS (held by a UW-Madison campus library), an area clearinghouse may send the request directly to the appropriate state level clearinghouse/resource library.

   b. If an item is held by **more than one** of these state level clearinghouses/resource libraries, the area clearinghouse(s) will send the request to them according to the following priority.

*Guidelines are for academic libraries in an area where there is a public library system. Academic libraries which are not in system areas should see the guidelines on p 24. WILS membership is not affected by whether or not a library is located within a system area.

(1) The Reference and Loan Library
(2) Milwaukee Public Library
(3) WILS

c. If an item is available from none of the state level clearinghouses/ resource libraries, the area clearinghouse(s) will refer the request to the Reference and Loan Library for further referral.

d. Requests for information (reference or subject requests) will all be referred to the Reference and Loan Library.

D. Further referral by state level clearinghouses/resource libraries

1. The Reference and Loan Library will refer unfilled requests for identified titles to Wisconsin State agency libraries, Milwaukee Public Library, WILS, public library systems in Wisconsin, the Illinois State Library, and MINITEX. Unfilled subject or reference requests will be referred to WILS Reference Service, UW-Madison Middleton Health Sciences Library, and UW-Engineering/Information Services Division.

2. Milwaukee Public Library will return unfilled requests to the requesting clearinghouse library.

3. WILS will refer unfilled requests to other WILS interlibrary loan service members, MINITEX, the Reference and Loan Library, and University of Illinois.

Note: None of the state level clearinghouses will refer a request to a library within the area where it originated.

E. Other arrangements

1. Within Wisconsin

a. Requests may be sent directly to any library in the state which has specialized collections if the material or information is not available in the area or through an area clearinghouse. Prior to sending requests, the academic library should determine if the library with the specialized collection is willing to serve it directly.

b. By mutual arrangement, academic libraries may borrow from each other prior to using other interlibrary loan channels. If unsuccessful contacts or referrals are made prior to sending a request to a state clearinghouse or another library, the library should record on the request which libraries have been contacted.

2. Out-of-state

a. Academic libraries may send requests for materials or information not available in Wisconsin to any library which will serve them directly.

Note: Under reciprocal borrowing agreements, the Reference and Loan Library and WILS access Minnesota libraries belonging to MINITEX, the Illinois State Library, and the University of Illinois. Therefore, it is not necessary to access these libraries directly.

To facilitate out-of-state referral and to assure that the referral will receive attention, the request should include a statement that the material is not available in Wisconsin.

b. For requests received from outside Wisconsin, each library should follow its own lending policy. If your library sends requests directly to libraries outside Wisconsin, you may want to consider lending to libraries outside Wisconsin.

F. Referral from the state level to the area level

When a state level clearinghouse has utilized all state level resources available to it and verifies that an individual library is the only available source for an item, the following actions will be taken.

1. If the item is owned by a public library system clearinghouse or resource library or by a public library within the system, the Reference and Loan Library will refer requests to the public library system clearinghouse.

2. If the item is owned by a library other than a public library or a WILS interlibrary loan service member, the Reference and Loan Library will refer requests directly to the library or to the public library system clearinghouse according to the pattern established in the area plan.

c. If the item is owned by a WILS interlibrary loan service member, WILS will refer the request to the member library.

d. Milwaukee Public Library does not refer requests to area level libraries or clearinghouses on behalf of other libraries.

WISCONSIN INTERLIBRARY LOAN PATTERNS

IV. VOCATIONAL-TECHNICAL SCHOOL LIBRARIES*

A. Library level

The vocational-technical school library staff should be certain that the materials or information cannot be found in their own collection and provided in a timely fashion to fill the request.

B. Area level

1. The library staff should use any resource sharing tools available in the library to determine if materials are available within the area defined by the area plan. The library may send requests to any library within the area owning the materials and participating in the area plan or, if authorized, directly to the area clearinghouse. If unsuccessful contacts or referrals are made to libraries within the area prior to sending a request to an area clearinghouse, the library should record on the request which libraries have been contacted.

2. The public library system headquarters or resource library will be a designated area clearinghouse. Other area clearinghouses or resource libraries may be listed in the area plan.

C. State level

1. WILS (Wisconsin Interlibrary Services) members will normally send interlibrary loan and reference requests directly to WILS.

2. A vocational-technical school library may send verified requests directly to a state level clearinghouse or resource library if the vocational-technical school library is a WILS member interlibrary loan service member or has been authorized to send requests to other state level clearinghouses or resource libraries.

3. If requests are sent through an area clearinghouse(s), the clearinghouse will verify bibliographic information and identify possible locations for the item requested using available statewide resource sharing tools. The request will be referred in one of the following ways.

    a. If an item is identified as being available from only one of the following state level clearinghouses/resource libraries: The Reference and Loan Library, Milwaukee Public Library, or WILS (held by a UW-Madison campus library), an area clearinghouse may send request directly to the appropriate state level clearinghouse/ resource library.

*Guidelines are for vocational-technical libraries which are located in areas where there is a public library system. Vocational-technical libraries located in areas where there is no public library system should see guidelines on p. 24. WILS membership is not affected by whether or not a library is located within a system area.

b. If an item is held by **more than one** of these state level clearinghouses/resource libraries, the area clearinghouse(s) will send the request to them according to the following priority.

(1) The Reference and Loan Library
(2) Milwaukee Public Library
(3) WILS

c. If an item is available from **none** of the state level clearinghouses/resource libraries, the area clearinghouse(s) will refer the request to the Reference and Loan Library for further referral.

d. Requests for information (reference or subject requests) will all be referred to the Reference and Loan Library.

D. Further Referral by state level clearinghouses/resource libraries

1. The Reference and Loan Library will refer unfilled requests for identified titles to Wisconsin State agency libraries, Milwaukee Public Library, WILS, public library systems in Wisconsin, the Illinois State Library, and MINITEX. Unfilled subject or reference requests will be referred to WILS Reference Service, UW-Madison Middleton Health Sciences Library, and UW-Engineering/Information Services Division.

2. Milwaukee Public Library will return unfilled requests to the requesting clearinghouse library.

3. WILS will refer unfilled requests to other WILS interlibrary loan service members MINITEX, the Reference and Loan Library, and University of Illinois.

Note: None of the state level clearinghouses will refer a request to a library within the area where it originated.

E. Other arrangements

1. Within Wisconsin

a. Requests may be sent directly to any library in the state which has specialized collections if the material or information is not available in the area or through an area clearinghouse. Prior to sending requests, the vocational-technical school library should determine if the library with the specialized collection is willing to serve it directly.

b. By mutual arrangement, vocational-technical school libraries may borrow from each other prior to using other interlibrary loan channels. If unsuccessful contacts or referrals are made prior to sending a request to a state clearinghouse or another library, the library should record on the request which libraries have been contacted.

2. **Out-of-state**

   a. Vocational-technical school libraries may send requests for materials or information not available in Wisconsin to any library which will serve them directly.

      Note: Under reciprocal borrowing agreements, the Reference and Loan Library and WILS access Minnesota libraries belonging to MINITEX, the Illinois State Library, and the University of Illinois. Therefore, it is not necessary to access these libraries directly.

      To facilitate out-of-state referral and to assure that the referral will receive attention, the request should include a statement that the material is not available in Wisconsin.

   b. For requests received from outside Wisconsin, each library should follow its own lending policy. If your library sends requests directly to libraries outside Wisconsin, you may want to consider lending to libraries outside Wisconsin.

F. Referral from the state level to the area level

When a state level clearinghouse has utilized all state level resources available to it and verifies that an individual library is the only available source for an item, the following actions will be taken.

1. If the item is owned by a public library system clearinghouse or resource library or by a public library within the system, the Reference and Loan Library will refer requests to the public library system clearinghouse.

2. If the item is owned by a library other than a public library or a WILS interlibrary loan service member, the Reference and Loan Library will refer requests directly to the library or to the public library system clearinghouse according to the pattern established in the area plan.

3. If the item is owned by a WILS interlibrary loan service member, WILS will refer the request to the member library.

4. Milwaukee Public Library does not refer requests to area level libraries or clearinghouses on behalf of other libraries.

WISCONSIN INTERLIBRARY LOAN PATTERNS

V. SPECIAL LIBRARIES*

Special libraries include institution, state agency, business and industry, and health science libraries.

A. Library level

The special library staff should be certain that the materials or information cannot be found in their own collection and provided in a timely fashion to fill the request.

B. Area level

1. The library staff should use any resource sharing tools available in the library to determine if materials are available within the area defined by the area plan. The library may send requests to any library within the area owning the materials and participating in the area plan or, if authorized, directly to the area clearinghouse. If unsuccessful contacts or referrals are made to libraries within the area prior to sending a request to an area clearinghouse, the library should record on the request which libraries have been contacted.

2. The public library system headquarters or resource library will be one designated area clearinghouse. Other area clearinghouses or resource libraries may be listed in the area plan.

3. Wisconsin Health Science Library Network consortium members may send health science related requests to other consortium members in their area.

C. State level

1. WILS (Wisconsin Interlibrary Services) members will normally send interlibrary loan and reference requests directly to WILS.

2. A special library may send verified requests directly to a state level clearinghouse or resource library if the special library is a WILS interlibrary loan service member or has been authorized to send requests to other state level clearinghouses or resource libraries.

3. State agency and state institution libraries are authorized to send requests directly to the Reference and Loan Library.

4. Wisconsin Health Science Library Network consortium members may send health science related requests directly to the UW-Madison Middleton Health Science Library and the Medical College of Wisconsin.

*Guidelines are for special libraries in an area where there is a public library system. Special libraries which are not in system areas should see the guidelines on p. 24. WILS membership is not affected by whether or not a library is located within a system area.

5. Corporate libraries may send requests to the Information Services Division at the UW-Engineering Library in Madison if the library is willing to pay a fee.

6. If requests are sent through an area clearinghouse(s), the clearinghouse will verify bibliographic information and identify possible locations for the item requested using available statewide resource sharing tools. The request will be referred in one of the following ways.

   a. If an item is identified as being available from **only one** of the following state level clearinghouses/resource libraries: The Reference and Loan Library, Milwaukee Public Library, or WILS (held by a UW-Madison campus library), an area clearinghouse may send the request directly to the appropriate state level clearinghouse/resource library.

   b. If an item is held **by more than** one of these state level clearinghouses/resource libraries, the area clearinghouse(s) will send the request to them according to the following priority.

      (1) The Reference and Loan Library
      (2) Milwaukee Public Library
      (3) WILS

   c. If an item is available from **none** of the state level clearinghouses/ resource libraries, the area clearinghouse(s) will refer the request to the Reference and Loan Library for further referral.

   d. Requests for information (reference or subject requests) will all be referred to the Reference and Loan Library.

D. **Further Referral by state level clearinghouses/resource libraries**

1. The Reference and Loan Library will refer unfilled requests for identified titles to Wisconsin State agency libraries, Milwaukee Public Library, WILS, public library systems in Wisconsin, the Illinois State Library, and MINITEX. Unfilled subject or reference requests will be referred to WILS Reference Service, UW-Madison Middleton Health Sciences Library, and UW-Engineering/Information Services Division.

2. Milwaukee Public Library will return unfilled requests to the requesting clearinghouse library.

3. WILS will refer unfilled requests to other WILS interlibrary loan service members, MINITEX, the Reference and Loan Library, and University of Illinois.

   Note: None of the state level clearinghouses will refer a request to a library within the area where it originated.

E. Other arrangements

1. Within Wisconsin

a. Requests may be sent directly to any library in the state which has specialized collections if the material or information is not available in the area or through an area clearinghouse. Prior to sending requests, the special library should determine if the library with the specialized collection is willing to serve it directly.

b. By mutual arrangement, special libraries may borrow from each other prior to using other interlibrary loan channels. If unsuccessful contacts or referrals are made prior to sending a request to a state clearinghouse or another library, the library should record on the request which libraries have been contacted.

2. Out-of-state

a. Special libraries may send requests for materials or information not available in Wisconsin to any library which will serve them directly.

Note: Under reciprocal borrowing agreements, the Reference and Loan Library and WILS access Minnesota libraries belonging to MINITEX, the Illinois State Library, and the University of Illinois. Therefore, it is not necessary to access these libraries directly.

To facilitate out-of-state referral and to assure that the referral will receive attention, the request should include a statement that the material is not available in Wisconsin.

b. For requests received from outside Wisconsin, each library should follow its own lending policy. If your library sends requests directly to libraries outside Wisconsin, you may want to consider lending to libraries outside Wisconsin.

F. Referral from the state level to the area level

When a state level clearinghouse has utilized all state level resources available to it and verifies that an individual library is the only available source for an item, the following actions will be taken.

1. If the item is owned by a public library system clearinghouse or resource library or by a public library within the system, the Reference and Loan Library will refer requests to the public library system clearinghouse.

2. If the item is owned by a library other than a public library or a WILS interlibrary loan service member, the Reference and Loan Library will refer requests directly to the library or to the public library system clearinghouse according to the pattern established in the area plan.

3. If the item is owned by a WILS interlibrary loan service member, WILS will refer the request to the member library.

4. Milwaukee Public Library does not refer requests to area level libraries or clearinghouses on behalf of other libraries.

WISCONSIN INTERLIBRARY LOAN PATTERNS

VI. LIBRARIES WHICH ARE NOT IN PUBLIC LIBRARY SYSTEM AREAS*

A. Library level

The library staff should be certain that the materials or information cannot be found in their own collection and provided in a timely fashion to fill the request.

B. Area level

By mutual arrangement, libraries may borrow from each other. If unsuccessful contacts or referrals are made prior to sending a request to a state clearinghouse or another library, the library should record on the request which libraries have been contacted.

C. State level

The library may send requests to the Reference and Loan Library.

D. Further referral by the Reference and Loan Library

The Reference and Loan Library will refer unfilled requests for identified titles to Wisconsin State agency libraries and the Wisconsin State Historical Society.

E. Other arrangements

1. Within Wisconsin

Requests may be sent directly to any library in the state which has specialized collections. Prior to sending requests, the library should determine if the specialized resource library is willing to serve it directly.

2. Out-of-state

a. Libraries may send requests for materials or information not available in Wisconsin to any library which will serve them directly.

To facilitate out-of-state referral and to assure that the referral will receive attention, the request should include a statement that the material is not available in Wisconsin.

b. For requests received from outside Wisconsin, each library should follow its own lending policy. If your library sends requests directly to libraries outside Wisconsin, you may want to consider lending to libraries outside Wisconsin.

*These same guidelines apply to libraries located in public library system areas which choose not to participate in systems or which do not send requests through system clearinghouses or resource libraries.

MODEL WORKSHEET: USE IS VOLUNTARY

Area _____ Clearinghouse(s) _____ WILS member(s) _____

Date of Plan _____ _____ _____

Type of Library	(1) Individual Libraries: Send Requests directly within area before referring to CH: *a) c) b) d) (Check types)	(2) Ind. Libraries: Refer directly to area clearinghouse(s) (Specify)	(3) Ind.Libr.: Use direct patron referral	(4) Ind. Libraries: Send requests directly out of area (Specify)	(5) Clearinghouse: Refers to other libraries in area before referral out of area *a) c) b) d) (Check types)	(6) Refers to State level resource provider (Specify)	(7) Area Plan describes pattern for referral from State level to area libraries (Specify)	(8) Method of Delivery	(9) Method of Trans-mission of messages	(10) Method of Plan Dissemi-nation	(11) Comments:
Public											
School											
Academic											
Vo Tech											
Special											
Health Science											

*a) To similar type of library
b) To local public library
c) To county clearinghouse
d) To all other types of libraries